



# NEWS RELEASE

DEFENSE FINANCE AND ACCOUNTING SERVICE

1931 Jefferson Davis Highway, Crystal Mall 3  
Arlington, Virginia 22240-5291

Press Release 02-11  
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For External Release

## 2002 Tax Season Checklist for Retirees and Annuitants

The 2002 1099R tax forms for all Department of Defense military retirees and annuitants will be mailed to the home addresses on file with the Defense Finance and Accounting Service (DFAS) by Jan 15, 2003. Former spouses who receive pay as a result of a court ordered division of community property will also receive 1099Rs.

**Reissue Requests:** Retirees or annuitants who do not receive their 1099Rs by January 31, 2003 or have questions about their 1099R forms call **1-800-321-1080** or **216-522-5955**. When calling to request a reissue of your 2002 1099R, press **1** when prompted and your call will be forwarded to the next available Customer Service Representative. You can expect to receive the reissued 1099R approximately seven business days after your initial request.

Customer Service Representatives are available Monday through Friday, from 7 a.m. - 7:30 p.m. EST (except federal holidays). Paydays, or the first business day of each month are the busiest days for the CSRs. Mondays are also characteristically busy. For your convenience Saturday service will be available from Jan. 11 through Feb. 15, 2003 from 7 a.m. - 3:30 p.m. EST to accommodate tax season.

Customers may also write to the following addresses for service:

**\*Mailing addresses:**

**Retirees:**

Defense Finance and Accounting Service  
U.S. Military Retired Pay  
P.O. Box 7130  
London, KY 40742-7130  
Fax: 1-800-469-6559

**Annuitants:**

Defense Finance and Accounting Service  
U.S. Military Annuitant Pay  
P.O. Box 7131  
London, KY 40742-7131  
Fax: 1-800-982-8459

\*Always include your Social Security number and signature in all correspondence.

### Address changes

There are several ways customers can update addresses to ensure delivery of 2002 1099R, Retired Account Statement and Annuitant Account Statement.

- Log onto [www.dfas.mil](http://www.dfas.mil) and click on "Contact DFAS." Scroll down the page to the appropriate title, i.e., Retiree Pay or Annuitant Pay. For **Annuitants**, simply complete the form and send. For **Retirees**, scroll down and click on questions or comments regarding retired pay. Select "Military Retiree" then fill out the data fields. After you have completed your inquiry, click "Submit" at the bottom of the page. Email inquiries will be answered in five to seven business days.
- Use the Employee/Member Self Service (E/MSS) at <http://emss.dfas.mil>.
- Call us at 1-800-321-1080.
- Or, send us a letter or fax us (see address listed above).

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The amount withheld for state taxes does not automatically change when an address update is submitted. A letter requesting to change your state taxes is required. Include your Social Security number, printed name and signature. The monthly amount deducted for state taxes must be in whole dollars (no cents) and a minimum of \$10.00.

#### **Federal tax exemption**

Federal tax exemption does not automatically carry over into the next tax year. IRS regulations stipulate that a new W-4 must be completed **before** February 15 each year to maintain exempt status. To have a W-4 processed before that cutoff date, submit a completed W-4 form after January 1, 2003 but before February 10, 2003 to the address or fax number listed above.

#### **Marital status changes**

If your marital status has changed due to marriage, divorce, or death, your Survivor Benefits Plan election may need to be updated. Send a copy of the marriage certificate, divorce decree, or death certificate along with a brief letter to update your SBP election. Include your Social Security number and signature. Submit your request to the address or fax number listed above.

**Please note:** Changing SBP election does not automatically change beneficiary information for arrears of pay. The arrears of pay are any unpaid monies due the retiree up to the date of death. Complete a Change of Beneficiary form to update your beneficiary(ies). You may request these forms by contacting the Retired and Annuity Pay Contact Center (see phone number listed above).